

Presentation to
Digital Equipment Company Ltd.
22 April 1992

DEC Park
Reading

INPUT[®]

Piccadilly House, 33/37 Regent Street, London SW1Y 4NF, England
24, avenue du Recteur Poincaré, 75016 Paris, France
Sudetenstrasse 9, W-6306 Langgöns-Niederkleen, Germany

Tel. (071) 493-9335
Tel. (1) 46 47 65 65
Tel. 0 6447-7229

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 1999).

There is a growing awareness of the need to address the needs of people with mental health problems, and the importance of the role of the community. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help. This approach is based on the idea that people with mental health problems can lead a full and meaningful life, and that they should be given the opportunity to do so. The Department of Health (1999) has identified the need to develop a new approach to mental health care, one that is based on the principles of recovery, empowerment, and self-help.

Environmental Services

A U.K.-Focused Update

ECS-73

INPUT

Environmental Services

Key Findings

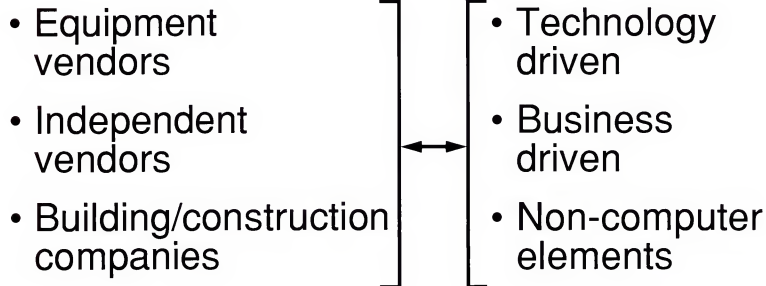
- Equipment vendor portion of U.K. market growing at a 12% CAGR
- Integrating systems and workplace technology is key driving force

E-CS-74

INPUT

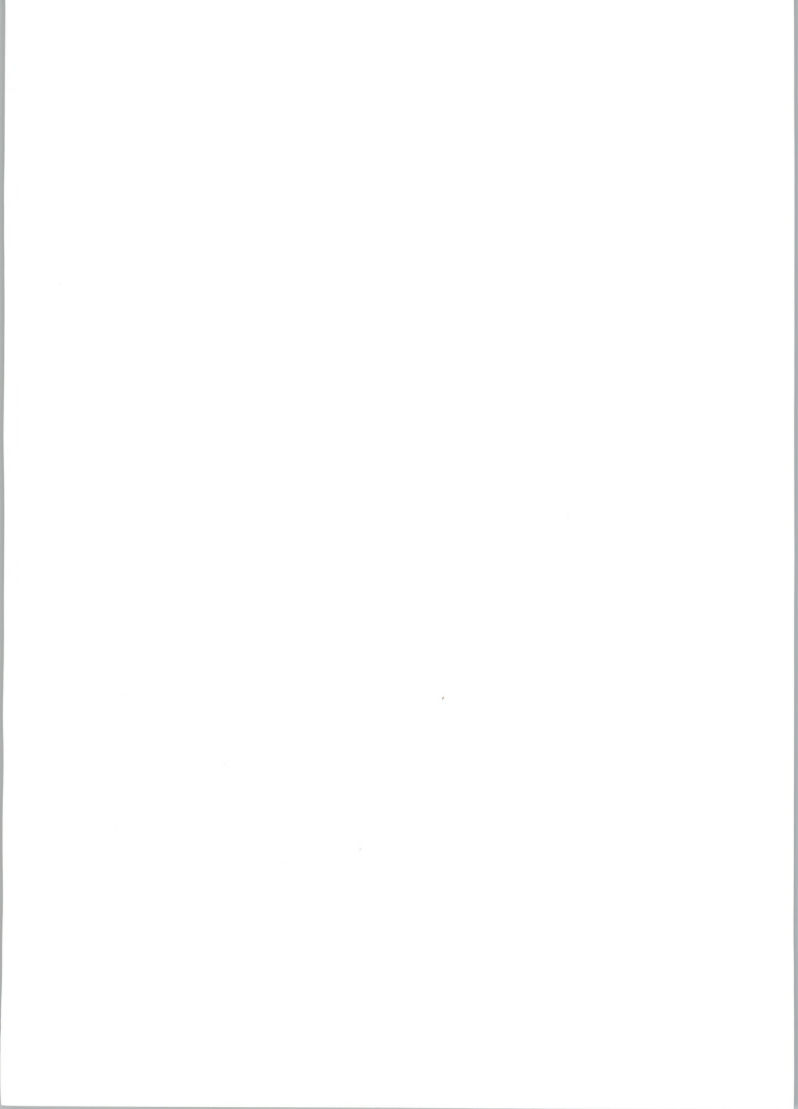
Competitive Environment

Fragmented Market



E-CS-75

INPUT



Environmental Services

Key Findings

- Need for vendor service not identified by 45% of users
- Market fragmentation is a key issue

the 1990s, the incidence of *S. flexneri* has increased in the United Kingdom [10]. In the United States, *S. flexneri* has been reported to be the most common serotype of *Shigella* isolated from children with shigellosis [11].

There is a paucity of data on the epidemiology of *S. flexneri* in the United Kingdom. In the 1970s, *S. flexneri* was the most commonly isolated *Shigella* serotype from patients with shigellosis in the United Kingdom [12]. In the 1980s, *S. flexneri* was the most commonly isolated *Shigella* serotype from patients with shigellosis in the United Kingdom [13]. In the 1990s, *S. flexneri* was the most commonly isolated *Shigella* serotype from patients with shigellosis in the United Kingdom [14].

The aim of this study was to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom.

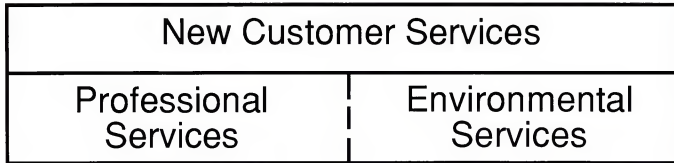
The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom.

The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom.

The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom.

The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom. The study was designed to determine the prevalence of *S. flexneri* in the United Kingdom.

Market Segmentation



- Consultancy
- Design
- Project mgmt.
- Implementation



- Computer room
- Cabling
- Power
- Installation

E-CS-77

INPUT

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995 (Department of Health 1996). The number of people employed in the health service has increased by 1.2 million, from 2.2 million in 1980 to 3.4 million in 1995.

There is a growing emphasis on the need to improve the efficiency of the health service, and to ensure that the health service is able to meet the needs of the population in a cost-effective manner. This has led to a number of initiatives, including the introduction of the Health Service Act 1990, which introduced a new framework for the health service, and the introduction of the Health Service Act 1997, which introduced a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

The Health Service Act 1990 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service. The Health Service Act 1997 introduced a number of changes to the health service, including the introduction of a new framework for the health service, and the introduction of a new framework for the health service.

Market Challenges

	Market (%)
Need for missionary marketing	45
Potential growth sector	15
Current market penetration	40
All users	100

Environmental Services

Market Drivers

- Rationalisation
- Growth of workplace technology
- Need to integrate systems
- User outsourcing trends

E-CS-79

INPUT

Environmental Services

Market Inhibitors

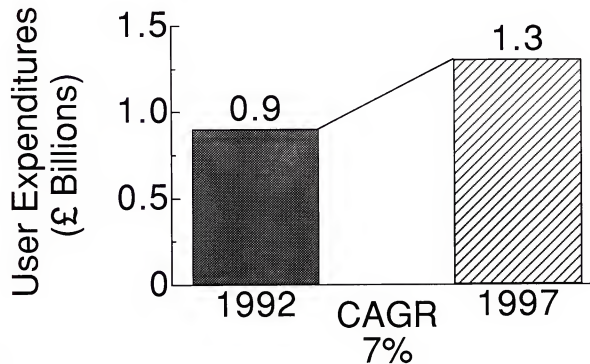
- Use of in-house resources
- Downsizing
- Lack of user awareness
- Standards—too many/too few

E-CS-80

INPUT

Environmental Services, U.K.

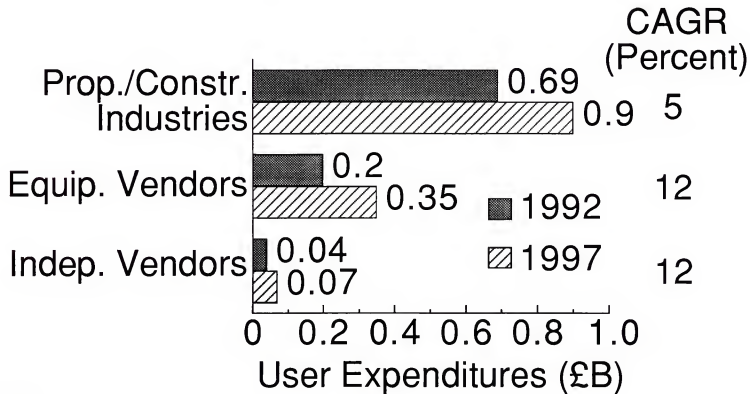
Market Growth



ECS-81

INPUT

Market Share by Vendor Type



E-CS-82

INPUT

the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million, and the number of people aged 75 and over has increased by 1.2 million (Office of National Statistics 1999). The number of people aged 65 and over is projected to increase to 6.5 million by 2010, and the number of people aged 75 and over to 4.5 million (Office of National Statistics 1999).

There is a growing awareness of the need to develop services to meet the needs of older people, and a number of initiatives have been developed to address this need. The Department of Health (1999) has published a strategy for older people, which sets out the government's commitment to improve the lives of older people. The strategy is based on three main principles: (1) to ensure that older people have the opportunity to live independently and actively; (2) to ensure that older people have access to the services and support they need; and (3) to ensure that older people are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that older people are a diverse group with different needs and interests; (2) that older people should be able to live independently and actively; (3) that older people should have access to the services and support they need; and (4) that older people should be treated with respect and dignity. The strategy sets out a number of key objectives, including: to improve the health and well-being of older people; to improve the social and economic participation of older people; to improve the living conditions of older people; and to improve the quality of life of older people.

The strategy also sets out a number of key actions, including: to improve the health and well-being of older people; to improve the social and economic participation of older people; to improve the living conditions of older people; and to improve the quality of life of older people. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

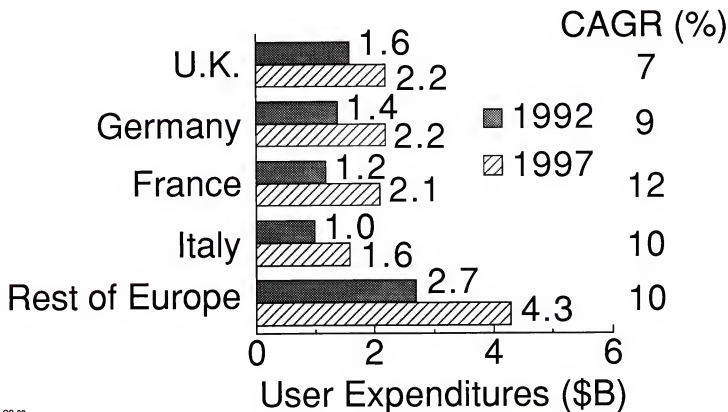
The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy. The strategy is a framework for action, and it is up to local authorities and other service providers to develop and implement the actions that are needed to achieve the objectives of the strategy.

Country Market Growth

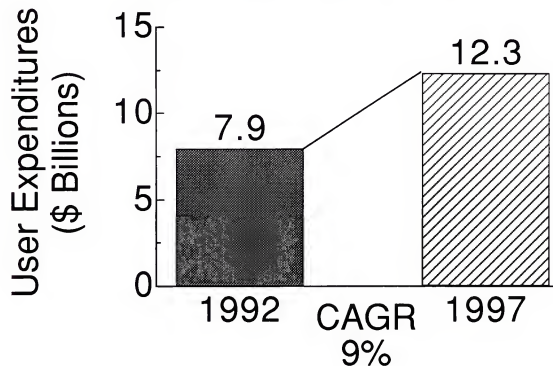


ECS-83

INPUT

Environmental Services, Western Europe

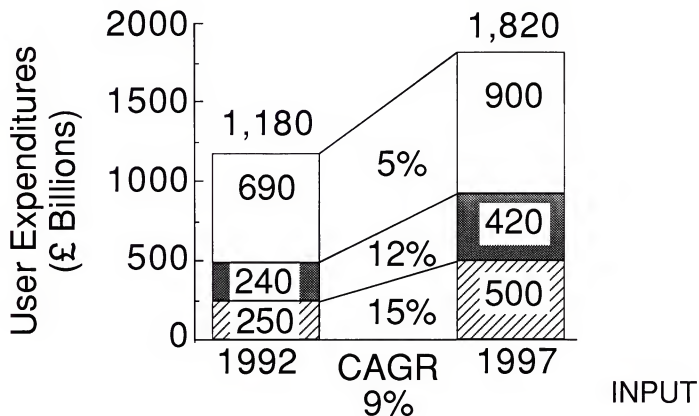
Market Growth



E-CS-84

INPUT

Prof'l and Environmental Svcs.



Professional and Environmental Services

- ☒ Nonenvironmental services (i.e., prof. services) with “industry vendors”
- ☒ Environmental services with “industry vendors”
- ☐ Environmental services with “non-industry vendors”

E-CS-86

INPUT

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has become a major employer in the UK, and its growth has been a major factor in the overall growth of the economy.

The public sector has also become a major employer of women. In 1980, women made up 40% of the public sector workforce, and by 1995, this figure had risen to 50%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of women in the workforce, and the increasing demand for public services.

The public sector has also become a major employer of young people. In 1980, young people made up 10% of the public sector workforce, and by 1995, this figure had risen to 20%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of young people in the workforce, and the increasing demand for public services.

The public sector has also become a major employer of people with disabilities. In 1980, people with disabilities made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of people with disabilities in the workforce, and the increasing demand for public services.

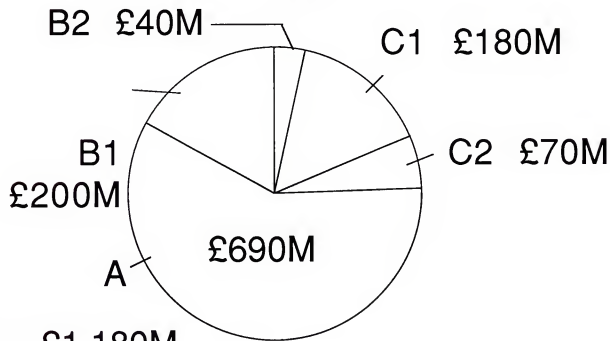
The public sector has also become a major employer of people from ethnic minorities. In 1980, people from ethnic minorities made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of people from ethnic minorities in the workforce, and the increasing demand for public services.

The public sector has also become a major employer of people from the lower social classes. In 1980, people from the lower social classes made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of people from the lower social classes in the workforce, and the increasing demand for public services.

The public sector has also become a major employer of people from the lower income groups. In 1980, people from the lower income groups made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of people from the lower income groups in the workforce, and the increasing demand for public services.

The public sector has also become a major employer of people from the lower education levels. In 1980, people from the lower education levels made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase has been driven by a number of factors, including the growth of the public sector, the increasing participation of people from the lower education levels in the workforce, and the increasing demand for public services.

Market Growth by Vendor Type—I



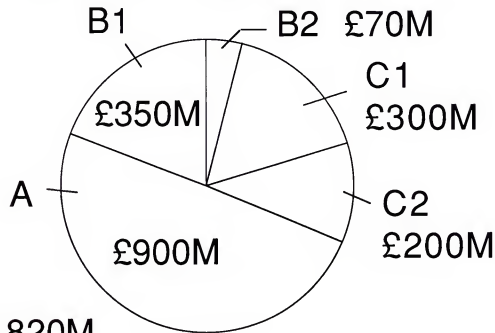
1992

Market = £1,180M

E-CS-87

INPUT

Market Growth by Vendor Type—II



1997
Market = £1,820M

E-CS-88

INPUT

Opportunities—I

System Range	Users Requiring Vendor Service (Percent)
Large Systems	10
Medium Systems	18
Small Systems	17

E-CS-89

INPUT

Opportunities—II

Country Market	Users Requiring Vendor Service (Percent)	Level of Interest
1. France	24	Medium
2. Germany	31	Low
3. Spain	14	High

E-CS-90

INPUT

Opportunities—III

Industry Sector	Users Requiring Vendor Service (Percent)	Level of Interest
1. Distrib.	25	Medium/High
2. Gov't.	23	High
3. Transp.	21	Medium/Low

Opportunities—IV

Vendor Installed Base	Users Requiring Vendor Service (Percent)	Level of Interest
1. Digital	20	Medium/High
2. IBM	14	Medium/Low
3. HP	15	Low
4. ICL	18	Medium

E-CS-92

INPUT

Vendor Perspective

- Building inadequacy
- Workplace technology
- Competitive market
- Fragmented market
- Lack of standards
- User-installable equipment

E-CS-93

INPUT

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has also become an important employer of women, with 5.5 million women employed in the public sector in 1995, compared with 4.5 million in 1980.

There are a number of reasons why the public sector has become an important employer of women. One reason is that the public sector has a high proportion of women in its workforce. In 1995, 88% of the public sector workforce were women, compared with 78% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

Another reason why the public sector has become an important employer of women is that it has a high proportion of jobs that are part-time or flexible. In 1995, 28% of the public sector workforce were employed on part-time or flexible contracts, compared with 18% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

A third reason why the public sector has become an important employer of women is that it has a high proportion of jobs that are well paid. In 1995, the average salary of a public sector employee was £18,000, compared with £15,000 in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

There are a number of other reasons why the public sector has become an important employer of women. One reason is that the public sector has a high proportion of jobs that are secure. In 1995, 88% of the public sector workforce were employed on permanent contracts, compared with 78% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

Another reason why the public sector has become an important employer of women is that it has a high proportion of jobs that are well located. In 1995, 28% of the public sector workforce were employed in London, compared with 18% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

A third reason why the public sector has become an important employer of women is that it has a high proportion of jobs that are well matched to women's skills. In 1995, 88% of the public sector workforce were employed in jobs that required a degree or higher qualification, compared with 78% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

There are a number of other reasons why the public sector has become an important employer of women. One reason is that the public sector has a high proportion of jobs that are well paid. In 1995, the average salary of a public sector employee was £18,000, compared with £15,000 in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

Another reason why the public sector has become an important employer of women is that it has a high proportion of jobs that are part-time or flexible. In 1995, 28% of the public sector workforce were employed on part-time or flexible contracts, compared with 18% in 1980. This is due to a number of factors, including the fact that the public sector has a high proportion of jobs that are traditionally held by women, such as teaching, nursing, and social work.

Primary Opportunities

- One-stop shopping
- Providing the cement
 - Project management
- Productivity

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1998 (Department of Health 1999). The number of people employed in the health service has increased by 1.2 million, from 2.2 million in 1980 to 3.4 million in 1998.

There is a growing emphasis on the need to improve the quality of care and services provided by the health service. This has led to a number of initiatives, including the introduction of the Health Service Act 1999, which aims to improve the quality of care and services provided by the health service. The Act sets out a number of objectives, including the need to improve the quality of care and services provided by the health service, to improve the efficiency of the health service, and to improve the accessibility of the health service.

The Health Service Act 1999 also sets out a number of measures to improve the quality of care and services provided by the health service. These measures include the introduction of a new system of regulation, the introduction of a new system of accreditation, and the introduction of a new system of inspection. The Act also sets out a number of measures to improve the efficiency of the health service, including the introduction of a new system of funding, the introduction of a new system of procurement, and the introduction of a new system of performance management.

The Health Service Act 1999 also sets out a number of measures to improve the accessibility of the health service. These measures include the introduction of a new system of referral, the introduction of a new system of waiting times, and the introduction of a new system of patient choice. The Act also sets out a number of measures to improve the quality of care and services provided by the health service, including the introduction of a new system of patient feedback, the introduction of a new system of patient participation, and the introduction of a new system of patient education.

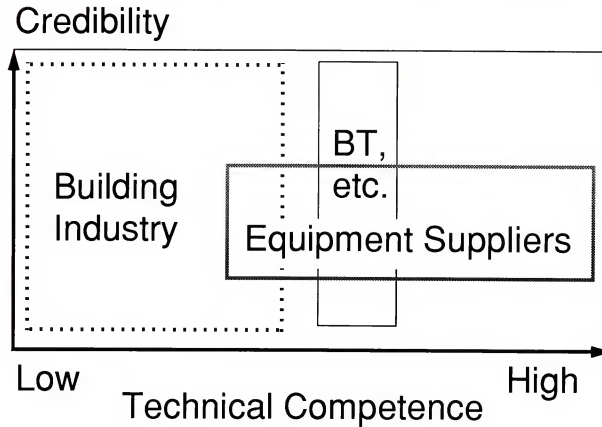
The Health Service Act 1999 also sets out a number of measures to improve the quality of care and services provided by the health service. These measures include the introduction of a new system of regulation, the introduction of a new system of accreditation, and the introduction of a new system of inspection. The Act also sets out a number of measures to improve the efficiency of the health service, including the introduction of a new system of funding, the introduction of a new system of procurement, and the introduction of a new system of performance management.

The Health Service Act 1999 also sets out a number of measures to improve the accessibility of the health service. These measures include the introduction of a new system of referral, the introduction of a new system of waiting times, and the introduction of a new system of patient choice. The Act also sets out a number of measures to improve the quality of care and services provided by the health service, including the introduction of a new system of patient feedback, the introduction of a new system of patient participation, and the introduction of a new system of patient education.

The Health Service Act 1999 also sets out a number of measures to improve the quality of care and services provided by the health service. These measures include the introduction of a new system of regulation, the introduction of a new system of accreditation, and the introduction of a new system of inspection. The Act also sets out a number of measures to improve the efficiency of the health service, including the introduction of a new system of funding, the introduction of a new system of procurement, and the introduction of a new system of performance management.

The Health Service Act 1999 also sets out a number of measures to improve the accessibility of the health service. These measures include the introduction of a new system of referral, the introduction of a new system of waiting times, and the introduction of a new system of patient choice. The Act also sets out a number of measures to improve the quality of care and services provided by the health service, including the introduction of a new system of patient feedback, the introduction of a new system of patient participation, and the introduction of a new system of patient education.

Vendor Positioning



E-CS-95

INPUT

Presentation to
Digital Equipment Company Ltd.

22 April 1992

DEC Park
Reading

INPUT®

Piccadilly House, 33/37 Regent Street, London SW1Y 4NF, England
24, avenue du Recteur Poincaré, 75016 Paris, France
Sudetenstrasse 9, W-6306 Langgöns-Niederkleen, Germany

Tel. (071) 493-9335
Tel. (1) 46 47 65 65
Tel. 0 6447-7229

